

Wisconsin CST and CCS Coordinating Committees-
Recruitment and Retention of Consumer and Parent-consumer Members:
Academic and Action Research Highlights

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INTRODUCTION

An analysis of membership recruitment and retention of consumers and parent-consumers to Wisconsin Coordinating Committees reveals an opportunity for improvement. (For the purposes of this document, *consumers* are defined as anyone age 18 or older who used or has used mental health or substance use support services. A parent-consumer is the parent of a child under age 18 with a diagnosed or undiagnosed severe emotional disorder who is engaged in at least two systems of care. The term *parent-consumer* acknowledges that the parent is the consumer and decision maker about services, has expertise on the impact of those services on the child, and is best equipped to share the child's perspective of services.) An increase in the members who identify with these two membership categories (consumer, parent-consumer) will help to ensure the proper functioning of the committee as well as compliance with Wisconsin state statute. Academic and action research, including a recent study by Wisconsin Family Ties, afford a plethora of information that may be of assistance to the coordinating committees.

One delineation of the recruitment and retention phases for membership on Wisconsin coordinating committees is outlined here. The process is broken into five phases: pre-recruitment, pre-retention; recruitment; onboarding; retention; exit. Within the document, actionable items follow each phase, potentially providing direction to committees searching for a change. However, this document is not intended to be comprehensive. Rather, roughly four-to-five engagement highlights are connected with each phase. This piece is expected to be used as a working document, one that facilitates brainstorming from the experts in the field including Wisconsin county staff, consumers, and parent-consumers. The document need not be read beginning to end, but can serve as a reference tool. Committees interested in additional information about research-supported ideas may find that the reference section provides guidance. Additionally, the reader is welcome to contact Robyn F. Hardt Schultz, Ph.D., Director of Research, Wisconsin Family Ties, robyn@wifamilyties.org or 262.271.0348.

It is known that the most important factor in recruiting and retaining members, including consumers and parent-consumers, is *feelings*. How does a prospect *feel* about joining? How does the member *feel* about participating? Is there a sense of prestige about involvement? Does the person feel safe in the environment? Does the person sense that they are respected and believe that they are making a difference to the committee work? Does the prospect believe they have the time and expertise needed to participate? Although organizations are wise to prepare and implement a broadly-based sound recruitment and retention plan, those organizations that are most effective with engagement learn about their individual prospects and members. Then the organizations respond accordingly to facilitate membership.

Prospect and member feelings are too complex to be assessed with a simple *good* or *bad*. Some organizations are especially inclusive, soliciting feedback about feelings on specific issues and committee structure topics on a regular basis. These organizations are willing to make minor modifications to ensure

that member participation is feasible and positive for each individual. The organizations are more likely to meet with membership success. This is not to say that committee membership is conflict-free. Rather, it points to the importance of *process* in each committee activity, from job description to agenda creation to discussions. Research indicates that a process that is inclusive, appropriately accommodating to individual needs, and sensitive to the motivators for each prospect or member, will fare well.

Using this information as a foundation for understanding, this document breaks recruitment and retention into distinct phases and provides actionable options that can fortify CST and CCS Coordinating Committee activity. Some ideas are related to logistics, such as meeting times that facilitate the participation of all parties involved. Some ideas appear simple, such as appointing a host for a new committee member. In actuality, even apparently simple ideas can be complex in nature. For example, it is not the mere act of the appointment of a host or the creation of a mentoring program that is important. Rather it is the way the behavior of the appointed person impacts the feelings of the new member. Is the new member warmly greeted by name before the start of the meeting? Does the prospect feel immediately welcome? Are there phone contacts between meetings to ensure that the new member is comfortable and feeling prepared for the next meeting, etc.?

Although this document provides ideas for actionable efforts by coordinating committees, it is important to remember the purpose behind the action: fostering a good relationship and a good experience for a new member. A committee choosing to implement one of the strategies listed in this document may need to spend time considering the potential influence on prospect/member feelings. As can often be the case, a completed research project may appear to simply confirm common sense ideas and outcomes. This is referred to as *hindsight bias* and for some readers may be in effect here with regard to this research project. This does not negate the importance of the findings of academic and action research, but rather indicates the importance of a methodical assessment in confirming or negating common sense. Remember that common sense often varies by stakeholder and stakeholder life-experiences. This Wisconsin Family Ties study assists coordinating committees by succinctly and methodically identifying research-supported information.

The purpose of this document is to highlight four-to-five ideas as related to each phase of recruitment and retention. This list may assist with brainstorming by the committees or county employees, or they may provide a starting point of change. The list is not comprehensive and not all listed insights are appropriate for each committee.

PHASE I

PRE- RECRUITMENT, PRE-RETENTION

This is the time to be sure that the coordinating committee has what it needs to be successful.

Staff Support

- **Ensure that at least one county staff member is accountable** for and available to support committee work. Ensure the staff member schedule has been adjusted for the time required to provide legitimate support.
- **Ensure the county staff member has access to necessary supports** such as an administrative assistant, a budget, stipend funding, peer networking, training on running coordinating committees, etc.
- **Consider supplementing staff support** by assigning a current committee member the responsibility to assist. Break the task into small pieces and assign accordingly. Consistently provide feedback on the task to the member (a feedback loop).

Staff Knowledge

- **Know your coordinating committee and individual members.** Share this knowledge with committee leaders.
- **Note, formally and informally, the committee:** purpose, measurable goals, and demographics.
- **Define long term goals,** with the deliberate participation of consumers and parent-consumers during the creation process.
- **Become knowledgeable about the history and vision** of the committee: term limits, stipends, by-laws, minimum expectations of members, process for resignation if the participant's situation suddenly changes, etc.
- **Know your committee's strength and weaknesses** including skill sets and diversity. Be aware of the needs of each individual consumer/parent-consumer and meet the needs of each single individual with support in and outside of the meeting. This might include cash advancements for bus travel, etc.
- **Ask committee members which form of communication they prefer.** Communicate in the member's first language, etc.

Preparation

Prepare to identify prospects

- **Create a job description that is sensitive** to diversity, languages, and reading skill levels. What do consumers and parent-consumers need to know in order to make an informed decision to join? Ask them directly. Ask both those who have said yes and those who have said no to participation. The creation process of this document is important. Also, job descriptions may be unique for different membership categories. Consider noting *what the prospect will receive in return for membership.* (See *Perks section.*)

- **Ensure the information about the committee, including minutes and meeting times, are easy to find for the committee members as well as for the general public.** Consider an easy to locate place on county/tribal website, newsletters, Facebook, and other mediums. Consider asking nonprofits who engage with care recipients to distribute or post the relevant information in order to help with promoting. For a brochure example that is relevant (but not an exact match) see Sauk County website at https://www.co.sauk.wi.us/sites/default/files/fileattachments/human_services/page/47421/ccs_brochure_-_adult.pdf.
- **Prepare an application for membership and be prepared to keep the completed ones on file long-term.** The best applications ask for key information such as *are you willing to identify as a consumer on the committee?* Collect applications even if no openings exist. Explain to the applicant that their information will be kept on file for future openings. Even if the prospect is not ready now, communicate that you are impressed (with skills or knowledge, etc.) and believe that when the timing is right, they will make a great member. You are prepared to wait. Remember, just because an application is completed doesn't mean an invitation is extended. The committee remains in control.
- **Prepare for diversity.** Consider the profile of the person that you would ideally like on the committee. Monitor membership categories but also geography, income, education, homelessness, etc. Research best practices about inclusive meeting cultures, etc. Prepare to provide extra supports, for example to those with low-income. Specifics might include car-pooling, providing meals for the entire family on meeting days, etc. Consider creating a statewide youth advisory committee for the CCS or CST Coordinating Committees with one youth representative attending the coordinating committee – with or without voting privileges. Exemplar can be found at *Overview* <http://www.acmh-mi.org/news/acmh-accepting-applications-statewide-youth-advisory-committee/>.

PHASE II RECRUITMENT

Promotion

- **Promote the coordinating committee** with the general public as well as with potential members. There doesn't have to be an immediate opening on the committee. Rather, you are generating awareness and long-term interest.

- **Connect with consumers and parent-consumers where they normally congregate.** Place written materials in those locales where potential consumer and parent-consumer members traditionally gather. Consider having a committee member make a presentation to a club house or other social gathering site to promote awareness.
- **Encourage current members to talk about the committee** with others and about the important work that is done. Promote conversations with family, friends, schools, general citizens, etc. Share old and new successes.
- **Contact nonprofits dedicated to working with consumers and parent-consumers.** Cultivate the relationship over the long-term. Share information and consistently highlight committee purpose and past successes. Regularly request recommendations and maintain the prospect's name (even prospects attained years ago) so that membership options exist when a committee member leaves. Consider having more than the minimum number of consumers and parent-consumers on the committee. This allows the committee to stay in compliance with state statute even as a member resigns.
- **Consider asking current members to present information/educate people** about the committee to schools, service clubs, etc. Set up tables at community events.

Cultivation

Connect with people who someday might become members and remind them over time that there are many reasons to join the committee. The goal is to generate awareness and maintain interest and enthusiasm.

- **Invite identified prospects (or potential referral sources) to observe a committee meeting** in person or via web. Make it clear that this is not an invitation to join, but an opportunity to learn about what a potential future commitment might look like. Be sure to be attentive when the prospect arrives.
- **Assign a host to greet the prospect** by name and sit with them at the meeting in order to ensure that the prospect feels welcome. The host should work to build rapport with the prospect. This is good public relations even if the prospect is not a match or in a position to join. Follow-up after the meeting to answer questions and get feedback. Thank them for attending.
- **Remain in contact with prospects over time** by occasionally reaching out with a copy of the minutes or an article of interest. This does not need to consume a large amount of staff time. However, it keeps people connected with the committee even if they are not currently in a position to assist.
- **As a prospect seems more viable as a member, discuss the perks of joining** such as an opportunity to connect with others in similar situations, stipends, the potential to gain leadership

experience, training and support offered to members, etc. For consumers and parent-consumers, typically the most important reason to join is to *make a difference* for themselves/others or their child. Be prepared to discuss committee successes, old and new. Consider noting these facts in any materials about the committee.

- **As the prospect seems more viable, encourage the prospect to review the information on the web or information already prepared by the committee.** Be prepared to share the job description and more details about expectations of members. Stay in semi-regular contact over time.
- **Promote perks** as listed in the section entitled *Perks*.

Application

When the timing feels right, ask the prospect if they would be willing to complete an application for the committee. A current opening need not exist, and this should be made clear.

- **Your request need not be correlated with the exact right time** for the prospect to commit to membership, but if there is future potential with a prospect it is fine to get an application well in advance of the ideal timing. Consider increasing the number of consumers and parent-consumer voting members allowed on the committee. SAMHSA recommends that 51% of coordinating committees be comprised of consumers. Studies indicate that consumers and parent-consumers are more likely to meaningfully participate in meetings if there is a critical mass of similar membership categories. This has the added perk of ensuring that a committee is in compliance with statute even if a member leaves unexpectedly.
- **Do not assume that everyone has access to or is comfortable with technology.** Be prepared to share paper applications, perhaps assist with the application to accommodate reading skills or language barriers, etc.

PHASE III WELCOME

Onboarding

Invite a prospect to join the committee. This should feel special to the prospect and not like a random last-minute decision. Once a prospect has been invited and agrees to join the committee, onboarding should begin. There are many steps related to onboarding.

- **Assign a veteran committee member to assume responsibility for onboarding** the new member. Match the people carefully. The more two people have in common, the faster and easier meaningful relationships are established. This is a relationship that may/should require interactions outside of coordinating committee meetings. Research indicates that contact before and after meetings, as well as a warm greeting by name upon entering the meeting, increases new member comfort level and impacts retention. Consider a semi-formal Mentoring Program.
- **Distribute an orientation** package which should include bylaws, job description, assortment of prior agendas and minutes, promotional materials, reports run in the past year or so, etc. Research indicates that both paper and electronic versions are helpful for a new member. Bylaw exemplar from the state of Michigan including very clear council responsibilities:
<https://www.michigan.gov/mdcr/-/media/Project/Websites/mdcr/doddbhh/advisory-council/bylaws.pdf?rev=1148bf5841e14093a22f83a832de57f4&hash=CA83CBABB1275C5BD21F65964463696C>
- **Before the first meeting, review the orientation package in person or via zoom**, etc. The new member needs to understand committee protocol before walking into their first meeting. Assuming that the new member can/will simply read the information independently is not helpful as new members indicate they feel overwhelmed, isolated, and as if they are not important to the committee.
- **Host a specialized orientation for those who are new to advisory or coordinating committees.** Provide detailed information and assist the new member in understanding how the system works. Review reports that are distributed over the course of the year and assist the new member in understanding the information (such as financial statements) and the connection with mental health and substance abuse systems. Discuss basic and advanced aspects of the coordinating committee and the system functioning as well as the very specific ways that the new member in particular could engage. A well-run orientation indicates to the new member that they are important.

Perks

Help prospects understand the value of their contribution to the committee as an expert with experience receiving services. Similarly, help the prospect to understand *what is in it for them*.

- **Identify perks related to membership** and report and leverage those regularly. Examples include connecting with peers, connecting with service providers, prestige, leadership opportunities, leadership training – formal and informal, stipend, and gift cards. Research indicates that most consumers and parent-consumers on Wisconsin CCS or CST coordinating committee members receive a verbal thank you upon entering and leaving the meeting room. No

other expression of gratitude is made. Thank yous help retention. Consider notes of gratitude, formal acknowledgement during the committee meeting when something special was accomplished, profile feature on web, etc. Consider including some of these perks in the job description.

- **Alleviate fears.** Communicate that there are no negative ramifications for involvement on the committee or comments made. Services will continue as usual. Some consumers/parent-consumers are afraid to participate in meetings due to a fear of repercussions. Perhaps put the new member in contact with a past member who can assure that there really are no negative ramifications. Assure the new member that you understand that sometimes consumer and parent-consumer situations change and they need to resign. That is OK and the decision will be met with respect.

PHASE IV RETENTION

Agenda

- **Prepare and distribute an appropriate agenda at least two weeks in advance. The process of preparing the agenda is key.** Engage consumers/parent-consumers in setting the agenda. The agenda is best received when the agenda includes something about mental health as well as substance abuse. Consider dispersing by multiple mediums. The agenda should clearly have topics of interest to consumers and parent-consumers, every time. Ask consumers and parent-consumers about what interests them. Engage new-member hosts or mentors in supporting new members. Retention is higher when consumers and parent-consumer help to create the agenda as opposed to just signing off or providing input during a meeting. Consider assigning at least part of the agenda-creating responsibility to a committee member, perhaps even a consumer or parent consumer. This leads to positives. Committees that offer leadership opportunities to consumers and parent-consumers are more likely to retain those members. Break tasks into very small pieces and assign a small piece. Encourage new members to reach out to peers about agenda topics pre-committee meeting so that consumers and parent-consumers can share more than their own perspective and their own story.

Inclusive Meetings

- **Follow best practices for running diverse and inclusive meetings.** Ensure consumers and parent-consumers are treated as equals to other committee members and as experts on their topic. Provide training for staff as well as for consumers and parent-consumers who might have the potential to become a co-chair and assist the county with the workload. Ensure that all have the

materials needed at least two weeks in advance of the meeting. Keys to inclusive meetings: meeting time that works for all or is at least varied (say Thursday and Saturday). This is known to improve the engagement of consumers and parent-consumers. Use language that all understand rather than acronyms, etc., Ensure that each member has had a chance to speak, even if that means calling on someone. It should be clear that it is OK to say *I don't have any comments at this time*. Do not deviate from the agenda. This renders the prep work done by consumers and parent-consumers as irrelevant. Be sure the group understands norms – especially *not interrupting a speaker*. This is known to be an unconscious powerplay that asserts the person doing the interrupting is most important. Interruptions also lend themselves to members feeling as if they are tokens. Provide snacks and/or meals, childcare, an opportunity for an aide to attend with the committee member, etc.

Engagement

- **Consider creating a membership-category specific advisory committee to assist with** the participation and retention of consumers and parent-consumers. Each membership category has their own committee that meets before the meeting to discuss agenda items. One member is a voting member of the coordinating committee. The voting consumer and parent-consumer have indicated that they are more likely to participate in coordinating committee meetings when this occurs. Consumers and parent-consumers are able to share multiple voices and are more confident about sharing in the coordinating committee meeting setting. This same format can work for youth. Encourage relationship building among all committee members.

Needs

- Meet individual needs. Know your members. Understand that facilitating the participation of one member may require out-of-the-box thinking, resources not previously available, a trade on time (the member attends the meeting and at that time picks up dinner for her family from the committee because there is no time left for her to cook at home.) These are not blanket accommodations. If a new member excuse is that they don't have enough time, explore that further to see if you can help free up some of their time. Consider onsite child and youth care. Directly ask the member about their own needs.

Cultivation Again

- Show appreciation as members work. Just as a college must work to retain students who are currently attending by providing a good student life program, the coordinating committee must make a point to retain current members by finding unique ways to recognize, thank, etc. Consider leadership opportunities, invites to special meetings, featured volunteer article, etc.
- Follow-through on membership perks.

- Gather feedback. Regularly check with consumers and parent-consumers individually to understand how they view the committee (strengths and weaknesses) and what they would ideally like the committee to accomplish in the next year. Ask them how they feel. Consumers and parent-consumers feelings matter and are the most accurate indication of their participation on the committee. Do they feel heard, understood, a part of the team, etc.? The feedback loop is key to retention. When something is accomplished, share and acknowledge even if it is small. If ideas were generated and forwarded, but eventually negated, share this too. Ask the decision maker for an explanation that can be shared with consumers and parent-consumers. Without this feedback loop, committee members often feel that their time was not well spent

PHASE V

EXIT

Expiration of term or resignation

- Member departures warrant celebration – It is important to acknowledge what the member has done even if the member must suddenly leave the committee. Throw a party that acknowledges the contributions of that member, even if they were minimal. Bring a cake to the meeting. This activity is as important for remaining members as it is for the departing member.
- Survey. Learn as much as possible about the member's experience while on the committee and their decision to leave. Conduct a formal survey if possible.
- Ongoing. Encourage the departing person to continue to promote the existence of the committee and the good work that is done. Consider adding the departing person to the list of prospective members that you are cultivating. They may be able to continue again in the future.
- Opportunity. Consider this an opportunity to assess the coordinating committee membership profile and skill-related needs. Training a new member may be important due to their current lack of skills. Participation on the committee actually helps a consumer and parent-consumer to feel empowered, one of the many goals of the CST and CCS programs.

SUMMARY

Feelings matter and are an indicator of the likelihood of success with coordinating committee recruitment and retention. Certainly, committee challenges will occur. Projects may not go smoothly and frustration is sure to be experienced by all members at some point. A consumer/parent-consumer need not

be coddled and sheltered from the regular experiences of committee membership. Consumers and parent-consumers can and often want to assist with these challenges. These typical committee dynamics and issues are expected, but as mentioned in this document it is not necessarily the solution that influences the feelings of consumers and parent-consumers. It is the process of arriving at the solution. Consumers and parent-consumers are looking for the treatment and respect that is afforded to non-service recipients who sit on the committee. Consumers and parent-consumers expect to be treated as equals and experts in their own right. They expect to make a difference within an inclusive meeting culture that validates all.

The hints provided in this document may help coordinating committees – one small change may alter the trajectory of your work. If a change is implemented, remember that inclusion and a sensitivity to feelings will assist with attaining success.